

# 1999 ANNUAL VISITORS RESEARCH REPORT



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## INTRODUCTION

The year 1999 was one of change for the collection and presentation of visitor statistics. First, the Hawaii Tourism Authority (HTA) was formed and developed a strategic plan that focused marketing efforts on more specific geographical areas. Eight major geographical markets were specified and the Convention Center was also established as a focus for marketing efforts. In order to support the HTA's marketing plan, visitor statistics needed to be refined and supplemented to provide adequate data on these specific markets.

Second, the Legislature assigned to the Department of Business, Economic Development and Tourism (DBEDT) the responsibility for gathering tourism statistics and providing them to both the HTA and the public. The Research and Economic Analysis Division (READ) was delegated responsibility to organize a tourism research and statistics program, building on the dedicated work over many decades of the Hawaii Visitors and Convention Bureau's Research Department. READ undertook an extensive review of visitor data sources and methodology. In order to provide the HTA with marketing data relevant to its market focus, new sources of statistics were developed and changes in methodology and presentation of the data were made. This process included a complete review of previous data sources and methodologies and extensive consultation with researchers and other users of visitor statistics.

The result is a more comprehensive set of statistics about Hawaii's visitors that better meets the HTA's marketing needs and also provides researchers and other users with more information about visitors than has previously been available. However, the increase in detail and comprehensiveness has required some reorganization of the way statistics are presented. This report provides updated statistics on visitors through 1999 based on new data collection methods and categories of presentation. Some discussion of the revisions is provided to help the reader better understand the differences between new and previous categories. For a more extensive discussion of the differences and rationale behind the changes, the reader is referred to the upcoming November 2000 issue of the DBEDT publication *Hawaii's Economy*. The publication will also be placed on the Department's web site at <http://www.hawaii.gov/dbedt>.

### Major Market Areas (MMA)

The first difference most users of visitor statistics will notice is a change from the broader categories of *Eastbound* and *Westbound* directions of visitor travel to *Major Market Areas*, or MMAs. This reorganization follows the HTA's segmentation of the world into specific geographical markets that will be targeted with marketing efforts to make the State more globally competitive. The MMA's are:

1. U.S. West – Pacific and Mountain States
2. U.S. East – Other States in the Continental U.S.
3. Japan
4. Canada

5. Europe – United Kingdom, Germany, France, Italy, and Switzerland
6. Oceania – Australia and New Zealand
7. Other Asia – China, Hong Kong, Korea, Singapore and Taiwan
8. Latin America – Argentina, Brazil and Mexico

By default, the 9<sup>th</sup> area consolidates all other geographical areas.

9. Other – All countries and districts not listed in MMA 1 to 8 above, including Guam, Puerto Rico, U.S. Virgin Islands, and other U.S. territories.

A final area of special marketing emphasis is the new convention center.

10. Hawaii Convention Center

### **Domestic-International vs. Eastbound-Westbound**

The second major difference is the organization of overall visitor data into *Domestic* and *International* points of origin, replacing the former breakdown of *Eastbound* and *Westbound* directions of travel. (The new, Domestic-International breakdown has been recalculated backwards to 1951 in order to provide a consistent, long-term time series of data for research purposes.)

The previous segmentation of visitors into two major directions of travel, Eastbound and Westbound, was based on sources of data available when the categories were first established many decades ago. The Westbound category included arrivals from the major foreign market of Canada along with arrivals from the U.S. mainland. Eastbound included flights from Asia, the Pacific Islands, Australia and New Zealand.

The market-specific focus of the HTA has required READ to develop better data on the residence of visitors. The best source for data on the residence of foreign visitors is the Immigration and Naturalization Service (INS), which monitors the status of persons entering the U.S. from foreign countries. However, the INS does not maintain information on whether Canadian visitors have arrived on Eastbound or Westbound flights. This made the previous, Eastbound-Westbound distinction difficult to maintain. The new Domestic-International categories, on the other hand, reflect the two major sources of data --INS for counts of visitors from foreign points of origin and domestic in-flight survey results for domestic points of origin.

### **Other Changes**

In addition to a reorganization of the statistics, revisions were also made to past data. New information from the U.S. Customs Service has been used to improve the distinction between visitors and returning residents aboard international flights. This information was used to revise 1998 and 1999 visitor counts. New information from the INS was also used to revise counts for individual countries. Historical data were adjusted to be consistent with the new methodologies.